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**Disabled Veteran Business Enterprise (DVBE)  
Advisory Council Meeting**

**AGENDA**

May 13, 2022

9:00 a.m. –10:00 a.m.

Keith Boylan, Co-Chair CalVet  
Rene Cota, Co-Chair Member  
Rebecca Aguilera-Gardiner, Member  
Keli Benham-Anthis, Member  
Noah Harris, Member  
Bobby McDonald, Member  
Cole Woodman, Member

Daniel Bates, CalVet  
Roberto Herrera, CalVet  
Jamie Jones, CalVet  
Sharee Nuez, CalVet  
Joshua Zebley, CalVet  
Michael Aguillio, DGS  
Anda Draghici, DGS  
Danetta Jackson, DGS  
Demeshia Swanson, DGS  
Matthew Zweier, DGS  
Stephanie Green, CPUC

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9:00am – 9:10am	CalVet Update	Keith Boylan, CalVet
9:10am – 9:15am	California Public Utilities Commission (CPUC) Certification	Stephanie Green, CPUC
9:25am – 9:40am	Legislative Update	John Spangler, CalVet
9:40am – 9:50am	Department of General Services (DGS) Update <ul style="list-style-type: none"><li>• Office of Small Business and DVBE Services (OSDS) Update</li><li>• OSDS Outreach Events</li><li>• Reciprocity Partner,</li><li>• Memorandum of Understanding (MOU)</li></ul>	Anda Draghici, DGS Michael Aguillio, DGS Matt Zweier, DGS
9:50am – 9:55am	DVBE Request for Response (R4R) <ul style="list-style-type: none"><li>• Report</li></ul>	Sharee Nuez, CalVet

Any questions please contact:  
[Sharee.Nuez@calvet.ca.gov](mailto:Sharee.Nuez@calvet.ca.gov)  
Telephone: (916) 651-7303

## ***Meeting Minutes***

### ***Attendance:***

- Rebecca Aguilera-Gardiner
- Michael Aguilio
- Keli Benham-Anthis
- Ally Bradley (alternate for Noah Harris)
- Rene Cota
- Anda Draghici
- Stephanie Green
- Roberto Herrera
- Jamie Jones
- Sharee Nuez
- Dameshia Swanson
- Cole Woodman
- Joshua Zebley
- Matt Zweier

***Call to Order:*** 9:00am, Rene

### ***CalVet Update***

***Roberto Herrera, CalVet***

- Time yielded for presentation

### ***California Public Utilities Commission (CPUC) Certification***

***Stephanie Green, CPUC***

- Overview of the California Public Utilities Commission (CPUC)
  - Regulates privately-owned electric, natural gas, telecommunications, water, railroad, rail transit, and passenger transportation companies
  - Ensures access to safe, clean, and reliable utility services and infrastructure at reasonable rates
  - Protects consumers against fraud
  - Promotes the health of California's economy
- Policies & Programs that Impact your Community
  - Key CPUC Policies
    - Energy Efficiency
    - Demand Response
    - Renewable Energy
    - Dynamic Pricing/ Time Varying Rates
    - Electric Vehicles

- Smart Grid
  - Transmission Planning and Permitting
  - Energy Generation and Infrastructure Safety
- Public Programs & Assistance
  - California Alternate Rates for Energy
  - California Lifeline
  - Deaf and Disabled Telecommunications scam and fraud protection
  - Assistance with formal consumer complaints
  - Safety Inspection
- CPUC Supplier Diversity Program
  - Public Utilities Code (PU Code) Sections 366.2 (m). 910.3 and 8283
    - Requires utilities and electric service providers to submit annual plans to increase procurement from women, minority, disabilities, disabled veteran, and LGBT business enterprises (which is to be defined as 'Diverse' for presentation purposes)
    - Requires utilities community choice aggregators (CCA) to annually submit plans to increase procurement from small, local, and diverse businesses in all categories; and Diverse procurement reports
    - Encourages cable television and direct broadcast satellite providers, wholesale power generators, distributed energy resource contractors, and energy storage system companies to adopt plans to increase procurement from Diverse firms
  - General Order (GO) 156 provides the framework for the CPUC supplier diversity program and currently provides a voluntary overall goal of 21.5%: 15% minority, 5% women, and 1.5% disabled veteran business enterprises
  - The Commission reports annually to the California Legislature on the results on the utilities' procurement diversity programs subject to GO 156
    - Significant developments and trends are analyzed
    - Report includes statistical information for comparison purposes among utilities
  - 2021 Utilities WMDVLGBTBE Procurement Overview
    - Total Diverse Spend: \$12.3 Billion (31.4%)
      - 8(a): \$745,834 (0.02%)
      - LGBTBE: \$55.2 million (0.14%)
      - MBE: \$7.3 billion (18.6%)
      - WBE: \$4.1 billion (10.5%)
      - DVBE: \$810.8 million (2.1%)
      - Subcontracting: \$2.3 billion (5.9%)
- GO 156 Rulemaking
  - The Commission approved revisions to GO 156 to conform to recent legislation and adopt revisions on April 7, 2022
    - Revisions adopted include: Senate Bill 255: (Bradford 2019)
    - Added reporting requirements for certain Electric Service Providers & Community Choice Aggregators to GO 156
    - Voluntary compliance to the program by other non-utility entities, including wholesale electric generators, distributed energy resource contractors, and energy storage system companies
    - Adopted LGBT target percentage procurement goal. The decision adopted a goal for LGBT-Business Enterprises of 0.5% and increasing to 1.5% in three years
    - Incorporated Persons with Disabilities Business Enterprises (PDBE)
    - Required utility annual reports
      - Data on workforce & board diversity

- Impacts to Disabled Veterans
  - California Firms
    - California disabled veteran owned businesses may get certified by DGS as a Disabled Veteran Business Enterprise (DVBE). Per California Military and Veterans Code Section 999 et seq.,
      - DGS requires firms be California domiciled to get certified as a DVBE. DVBE firms in DGS database are automatically added to CPUC Supplier Clearinghouse (SCH) database
    - With the addition of the new category, Persons with Disabilities Business Enterprise (PDBE), DVBE firms who are in the Clearinghouse will now be issued a second certification in the Clearinghouse as a Persons with Disabilities Business Enterprise (PDBE)
      - California disabled veteran owned businesses will have two certifications: a Disabled Veteran Business Enterprise(DVBE) and a Persons with Disabilities Business Enterprise (PDBE) certification
  - Out of State Firms
    - Disabled Veteran Owned firms outside California are not eligible to get certified as a DVBE, as they do not satisfy the California domicile requirement
    - Non-Californian disabled veteran owned firms may now apply to CPUC Supplier Clearinghouse or DisabilityIn for a Persons with Disabilities Business Enterprise (PDBE) certification
      - They can get a Persons with Disabilities Business Enterprise (PDBE) certification, but not a Disabled Veteran Business Enterprise (DVBE)certification
- Get Certified
  - Certification is free and there is no fee to apply or participate in the verification process
  - Qualified applicants are entered into supplier database
  - Certification timeline
    - Review is approximately 30 days of receiving the application
    - Valid for 3 years
  - Benefits of Certification
    - Official recognition of business diverse status
    - Business will be listed in the database utilities, CCAs, and other entities utilize when searching for diversity suppliers to include in bid opportunities
    - In their annual supplier reports, utilities, CCAs and other entities only include purchases from certified diverse businesses
    - Businesses will be included in CPUC, and utilities related event marketing
    - Access to program sponsored educational/business development seminars, workshops, business development training
- Supplier Clearinghouse
  - Supervised by the CPUC Supplier Diversity Program
  - Verifies Diverse status
    - DGS establishes eligibility of DVBE and provides information to the Clearinghouse
    - Clearinghouse maintains a Diverse business database
- Supplier Clearinghouse Certification
  - Business owned, at least 51% by minority, woman, disabilities, or LGBT person or persons and whose management and daily business operations are controlled by one or more of those persons

- Certification is free
- Application reviewed within four weeks
- Certification renewed every three years
- On-Line Secure Application
  - Required Documents May Include:
    - Financial Documents –Tax Returns, P&L Statements
    - Organizational & Governance Documents – Articles of Incorporation, Articles of Organization, By-Laws, Operating Agreements
    - Owner Documents – Resume, Photo ID, Proof of U.S. Citizenship/Permanent Residency
    - Diverse category (women, minority, LGTB, Disabilities) Qualifying Document(s)
- Supplier Clearinghouse accepts the certifications of:
  - The National Minority Supplier Development Council (NMSDC)
  - The Women's Business Enterprise National Council (WBENC)
  - National Gay & Lesbian Chamber of Commerce (NGLCC)
  - The United States Small Business Administration (SBA) 8(a)
  - DisabilityIn
- Website: [www.thesupplierclearinghouse.com](http://www.thesupplierclearinghouse.com)
- Contact Information:
  - Email: [info@thesupplierclearinghouse.com](mailto:info@thesupplierclearinghouse.com)
  - Phone: (800) 359-7998

### ***Legislative Update***

#### ***John Spangler, CalVet***

- SB 1478 (Archuleta) Disabled veteran business enterprises
- Resource: [https://leginfo.legislature.ca.gov/faces/billNavClient.xhtml?bill\\_id=202120220SB1478](https://leginfo.legislature.ca.gov/faces/billNavClient.xhtml?bill_id=202120220SB1478)
- Action Item: Council to provide Letter of Recommendation to Secretary of CalVet

### ***DGS Update***

#### ***Anda Draghici, DGS***

- OSDS Solicitation Report to be sent in separate email
- Certification
  - Current backlog, there is a delay due to the extensions that were given
  - Current wait time is 4-6 weeks
  - Contact OSDS Certification for details or questions
- DVBE State Contract Requirements pertaining to SB588 webinar: 5/24
  - Target audience are all DVBEs including but not limited to prime and subcontractors
- As required by law OSDS conducted an escalation study, which is the bi-annual review of Gross Annual receipts
  - Completed ever 2 years to consider the California Price Index
  - Adjust the gars to reflect inflation
    - This year included unprecedented inflation rates and increase in the Consumer Price Index
  - Prior to June 1<sup>st</sup> the announcement of the Small Business Gross Annual Reciepts are to increase from \$15 million to \$16 million, the Microbusiness will remain unchanged, and the gars for the small business in public works will increase from \$36 million to \$37 million

- Starting January 1, 2023 it will then increase from \$37 million to \$38 million
  - Follow-up on this will be presented as the date approaches in regards to the increase in gars
- New Fi\$Cal tool: Purchase Order Payment History
  - Provides the ability to track and check the status of their payment
  - Search by supplier, vendor, or certification
  - Review of history of Purchase Order
- Supplier Diversity Collection
  - Addition of the new voluntary supplier diversity collection opportunity for all new businesses registering with the State and for current registered businesses, bidders, vendors, suppliers, or certified firms within their profile on Cal eProcure
    - Purpose is to allow the state to gain a better understanding of registered and certified business demographics in related to ethnicity, race, gender identity, and sexual orientation
    - This information will be used to determine where outreach and support is needed amongst various communities to support greater diversity in state contracting
    - Diversity information will not be used to grant a preference in state contracting
- Outreach Events
  - 5/17: Caltrans North Region Districts 1, 2, & 3, hosting a webinar “Caltrans North Region Virtual Meet the Primes in Construction”
    - Goal is to introduce Primes to potential Subs
    - Unique opportunity to gain insights what Primes are looking for in bids from Subs
  - 5/17: City of Los Angeles, DGS-OSDS, LA County Workforce, Aging & Community Services, DGS of Los Angeles
    - Government contract- Steady Income for Business
      - Class will cover finding and responding to public solicitations, understanding government contracts, State versus Federal contracts, the difference in State versus Federal requirements, business development and government contracting opportunities, and resources in the Los Angeles City & County
  - 5/18: I’m Certified Now What
    - Webinar will cover: finding bidding opportunities, improving Cal eProcure profiles, how to conduct market research, how to contact the advocates, review who are the reciprocity partners, review of Commercial Useful Function (CUF), and additional resources
  - 5/18: Doing Business with Construction Primes in San Francisco and with the Port of San Francisco
    - Webinar is intended for local business enterprises and construction firms in the San Francisco area
    - Topics include, bidding and pricing, overview of basic protocols, processes of submitting sub-bids, understand how to develop professional and credible resources and capability statement
  - 5/18: Meet the Primes, Architectural and Engineering hosted by Caltrans North Region
  - 5/18: Controller Betty Yee with the Hispanic Chamber of Commerce and the California Asian Chamber of Commerce hosting a small business webinar alongside several state agencies including, Small Business Association (SBA), DGS, California Department of Corrections & Rehabilitation (CDCR), Go-Biz, Franchise Tax Board, Employment Development Department (EDD), Secretary of State
    - Webinar will cover how to do business with the State Controller and all the state agency attendees

- 5/20: CalVet and the Veteran Peer Access Network (in person- Palmdale, CA)
  - Topics to include: CalVet Home Loans, Minority & Women Veterans Divisions, and DVBE
- 5/24: OSDS will be hosting a DVBE subcontracting on state contracts webinar
  - Webinar to include recently passed legislation, DVBE substitution rights & responsibilities, how to file a complaint regarding the small business and DVBE program, SB/DVBE Compliance, and state procurement methods to increase DVBE participation
- 5/24: OSDS & Society of American Military Engineers (SANE), in Los Angeles
  - Virtual networking
- 6/8: Small Business Advisory Council meeting
- Reciprocity Memorandum of Understanding (MOU)
  - DGS has no authority to exercise any oversight over local agencies contracting practices except with the acceptance of the certification which is the MOU that these entities currently encompass
  - Program Abuse is strictly related to certifications with state contracting in no relation to local entities or governance

### ***DVBE Request for Response (R4R) Report***

#### ***Sharee Nuez, CalVet***

- Report
  - Respondents: 55
  - Certified DVBE's completed survey: 27
  - Top Counties with the most respondents
    - Los Angeles (17%)
    - San Diego (11%)
    - Orange, Riverside, Sacramento, and San Diego (9%)
  - Top 5 Reasons for Completing R4R
    - Request for DVBE Information (73%)
    - Entrepreneurship Information (51%)
    - Veteran Benefits (49%)
    - Contracting with the State of California (47%)
    - Business Mentorship (45%)

### ***Open Discussion***

- Driving Veterans Success Act (HR 6527), Rebecca Aguilera-Gardiner

### ***Next meeting agenda topics***

- DGS updates
- R4R report

***Adjournment:*** 10:08am, Rene Cota